

CHUBB®

Chubb Environmental TankSafe® User Guide



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Disclaimer: This material contains product summaries intended for use solely by properly licensed insurance professionals. The insurance policy actually issued contains the terms and conditions of the contract. All products may not be available in all states and surplus lines products can be offered only through licensed surplus lines producers. Insurance described is provided by ACE American Insurance Company and its U.S.-based Chubb underwriting company affiliates. Chubb is the marketing name used to refer to subsidiaries of Chubb Limited providing insurance and related services. For a list of these subsidiaries, please visit our website at www.chubb.com. Chubb Environmental Risk, 11575 Great Oaks Way, Alpharetta, GA

Thank You for Using TankSafe®

If you cannot access the system or have any issues, please report the problem to:

ebusinesshelp@chubb.com

To ensure timely processing, please include:

- The policy number, and
- The insured's name as listed on the policy

Login

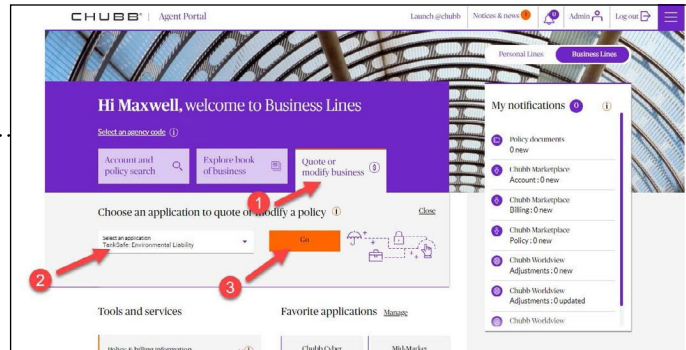
Enter your Chubb TankSafe username and password.

<https://secure.chubb.com>

- Username
- Password

Click [here](#) for step-by-step instructions for logging into TankSafe through the Chubb Agent Portal.

For password or other problems accessing the system, please contact your agency administrator.



Account Revocation

Ninety (90) days of inactivity

Your access to TankSafe® will be revoked if your account is inactive for ninety (90) days or more.

To reactivate, please email your agency administrator.

Licenses

Please note that as a Chubb Environmental Risk approved user of the Chubb Environmental Risk online systems, you conform to and operate only under the authority, if any, granted by your Chubb Environmental Risk producer agreement. For each submission you must have a producer license in the state in which the insured maintains its principal place of business. If you have any questions or concerns, please contact the TankSafe® Administrator at TankSafePolicyChange@chubb.com.

The broker must hold the appropriate license in the Insured's state of domicile and submit that License Number in TankSafe® before the account binds. Chubb Environmental Risk performs monthly audits on the information provided. If a license number is invalid, a warning will be issued via a formal letter to the broker. Further non-compliance due to licensing issues will be grounds for termination of access to TankSafe®. Access may be reinstated on a case-by-case basis and with evidence of proper individual and agency licenses.

Licensing Disclaimer: Nothing in this notice is meant to remove, change or supersede the responsibility of any broker to comply with the requirements of any given jurisdiction(s) including, but not limited to, licensing requirements or the proper payment of all applicable taxes.

Audit Requirements

Chubb Environmental Risk reserves the right to perform periodic audits on the broker’s TankSafe® book.

Chubb Environmental Risk FastTrack Dashboard

The Fast Track Dashboard lists all the submissions and policies assigned to your Chubb Environmental Risk Producer Code.

CHUBB Policy Administration Dashboard

Welcome to the Policy Administration Dashboard, TSTestUser4

Recently Accessed

| Client | LOB | Policy Number |
|-------------------|-----------------|-------------------------------|
| 123 i am not real | CarrierTankSafe | G73239481.002 |
| Tank 0911 | CarrierTankSafe | Q655633Q2023 |
| Umbrella 0911 | CarrierTankSafe | Q655630Q2023 |
| Jullieus caesar | CarrierTankSafe | G73246126.003 |
| PR 0911 | CarrierTankSafe | Q655632Q2023 |

Tasks

No Results Found

[View All Tasks](#)

Notifications

| Type | Message | Received |
|-------------------|---|-----------------------|
| Invalid territory | Checking the email trigger for policy #FSF52192393.001 | 9/25/2023 9:45:32 AM |
| Policy Notice | PR 0911 has been declined on 2023-09-11 05:48:00.890 AM. | 9/11/2023 5:48:00 AM |
| Policy Notice | Umbrella 0911 has been declined on 2023-09-11 05:46:29.996 AM. | 9/11/2023 5:46:30 AM |
| Policy Notice | Gulf Oil Pvt Ltd has been declined on 2023-08-16 10:18:54.963 AM. | 8/16/2023 10:18:54 AM |
| Policy Notice | Gulf Oil Pvt Ltd has been declined on 2023-08-16 10:17:58.402 AM. | 8/16/2023 10:17:58 AM |

[View All Notifications](#)

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This page provides several basic functions:

Search: The search function is in the top right corner. Be sure to select whether you are searching by Policy/Quote Number or Client Name in the drop down. Provide Policy/Quote Number or Client Name in the box to the right of the drop down; click on the magnifying glass or press enter.

Recently Accessed: This section will allow you to quickly reenter your most recent submissions.

Tasks: To view a submission or policy on the dashboard, click on the insured name or “View All Tasks”. After selecting insured name, click on Policy/Quote #, which will take you to your Fast Track record.

Tasks

No Results Found

[View All Tasks](#)

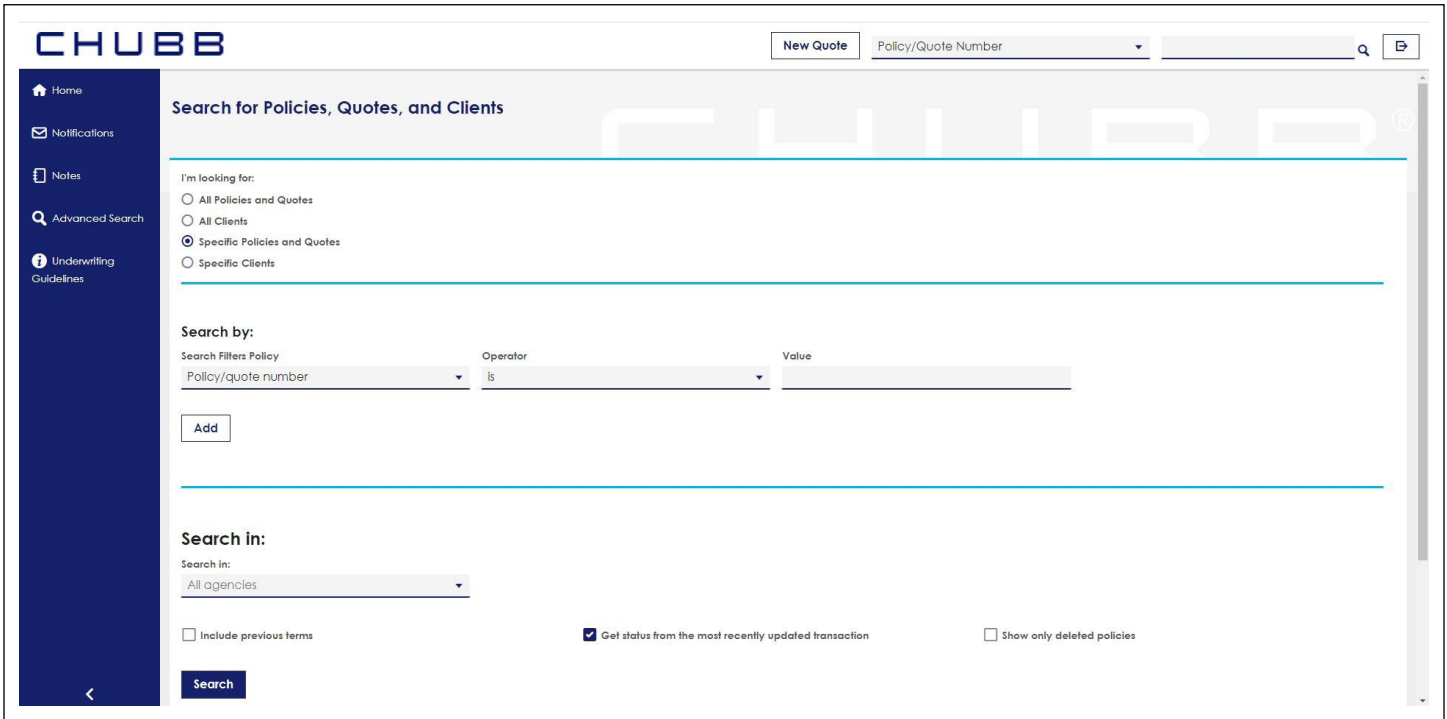
Notifications: To view the status of your submissions on the dashboard, click on the Message.

| Notifications ^ | | |
|--|---|-----------------------|
| Type | Message | Received |
| Invalid territory | Checking the email trigger for policy #FSF52192393 001 | 9/25/2023 9:45:32 AM |
| Policy Notice | PR 0911 has been declined on 2023-09-11 05:48:00.890 AM. | 9/11/2023 5:48:00 AM |
| Policy Notice | Umbrella 0911 has been declined on 2023-09-11 05:46:29.996 AM. | 9/11/2023 5:46:30 AM |
| Policy Notice | Gulf Oil Pvt Ltd has been declined on 2023-08-16 10:18:54.963 AM. | 8/16/2023 10:18:54 AM |
| Policy Notice | Gulf Oil Pvt Ltd has been declined on 2023-08-16 10:17:58.402 AM. | 8/16/2023 10:17:58 AM |

[View All Notifications](#)

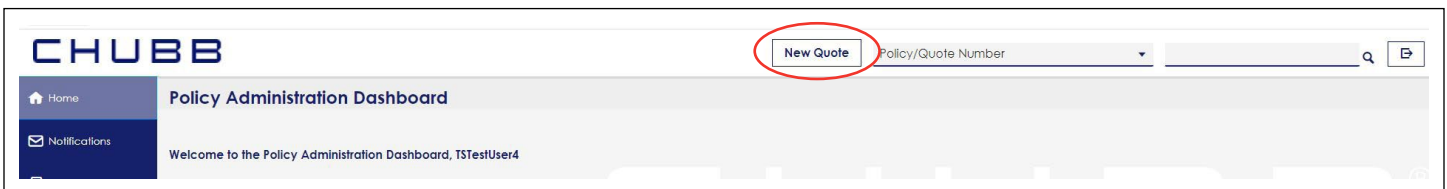
Advanced Search: This search function located on the dashboard, allows for broader search criteria with the following options:

- All policies and quotes
- All clients
- Specific policies and quotes
- Specific clients

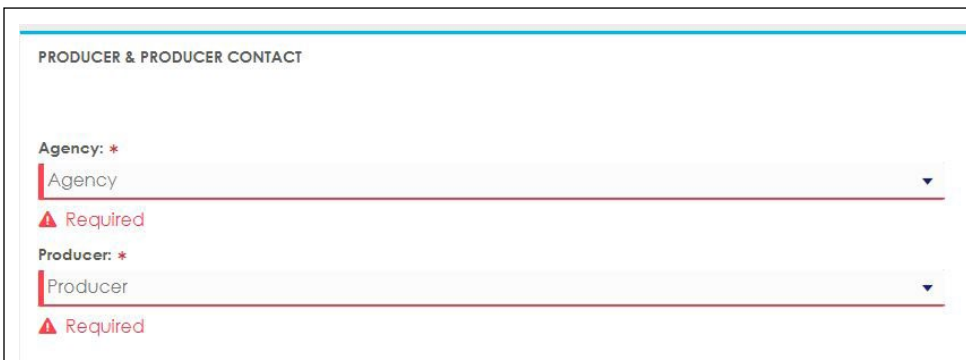


New Policy (Quote)

To begin a new submission, click the **New Quote** button at the top of the Dashboard screen.



The next screen is **Producer and Producer Contact**. Select your **Agency** and **Producer**.



Once the Agency and the Producer has been selected, Fast Track product icons will appear. Select **TankSafe** and choose the **Effective Date** of your policy. Click **Next** on the right-hand side of the screen to continue.

The screenshot shows the 'PRODUCER & PRODUCER CONTACT' section with the following details:

- Agency:** CHUBB INSURANCE SOLUTIONS AGENCY INC (CAP/PHL) (WHITEHOUSE STATION, NJ) 07458C
- Producer:** TSTestUser4
- Set this Producer as default.

The 'SELECT A PRODUCT' section shows five buttons: 'Special Event Products', 'Umbrella', 'TankSafe', 'Vacant Building and Vacant Land', and 'Commercial Package'. The 'TankSafe' button is circled in red.

The 'POLICY PERIOD' section shows:

- Effective Date:** 10/2/2023 (circled in red)
- Expiration Date:** 10/2/2024

Note: The effective date cannot be prior to the data entry date.

Account & Insured Info

On the Account & Insured Info page, the following information must be entered:

- Insured Name (Should be one (1) entity. For all other entities, please reach out to your underwriter.)
- Address • City • State • ZIP

After this information is entered, select the **Search Account** button.

The screenshot shows the 'ACCOUNT & INSURED INFO' page for quote Q655911Q2023. The 'INSURED INFO' section contains the following fields:

- Insured Name:** (Required field, currently empty)
- Address:** (Three stacked text input fields)
- City:** (Text input field)
- State:** (Dropdown menu, currently set to '(select)')
- Zip:** (Text input field)

The 'SEARCH ACCOUNT' button is circled in red. On the right side, a summary box displays:

- TANKSAFE**
- TankSafe®**
- Q655911Q2023
- AGENCY & PRODUCER**
- Agency:** CHUBB INSURANCE SOLUTIONS AGENCY INC (CAP/PHL)
- Producer:** TSTestUser4
- Buttons: Save and Exit, TankSafe Microsite

At the bottom, there is a footer with copyright information and the website URL www.chubb.com.

The search will provide Insureds, from which you select the appropriate one. If none appear, click on the **Create New Account** button.

INSURED INFO

Insured Name * TankSafe User Guide

Address * 100 S Broad St

City * Philadelphia

State * PA

Zip * 19106

No Results Found - Please use Create New Account button to create a new account

Create New Account

TANKSAFE

TankSafe®

Q655911Q2023

AGENCY & PRODUCER

Agency:
CHUBB INSURANCE SOLUTIONS AGENCY INC (CAP/PHL)

Producer:
TSTestUser4

[Save and Exit](#)

[TankSafe Microsite](#)

Select the appropriate **Industry Classification**.

CHUBB

New Quote | Policy/Quote Number

TankSafe User Guide
Q655911Q2023 | (Quote: New-Pending)

Last Saved: 10/2/2023 5:02:00 PM | Policy Actions

ACCOUNT & INSURED INFO

Name

Address * 100 S Broad St

City * Philadelphia

State * PA

Zip * 19106

FEIN

Industry Classification * (Select)

Type of Insurance *

Telephone #

Email Address

Is Loading and Unloading coverage to be included on the policy? *

TANKSAFE

TankSafe®

Q655911Q2023

AGENCY & PRODUCER

Agency:
CHUBB INSURANCE SOLUTIONS AGENCY INC (CAP/PHL)

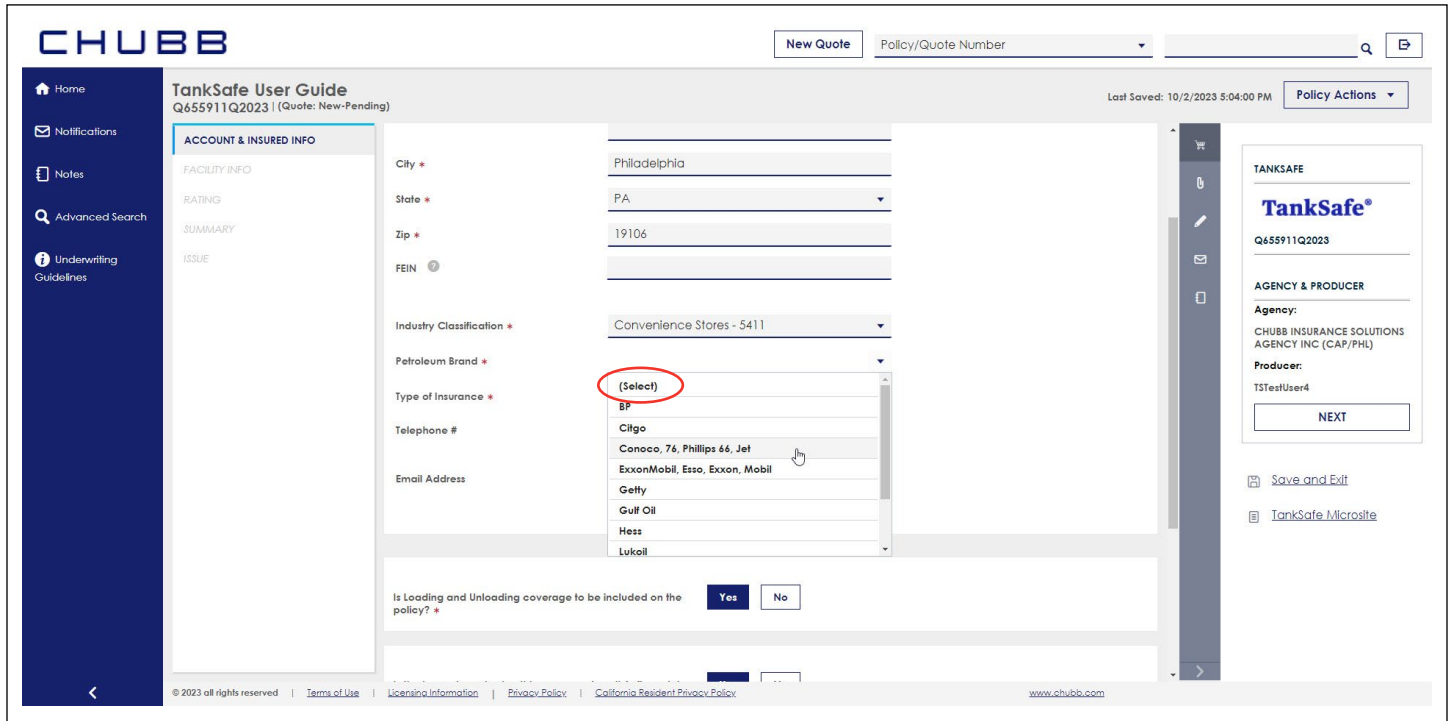
Producer:
TSTestUser4

[Save and Exit](#)

[TankSafe Microsite](#)

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If you choose gasoline service stations, convenience stores or petroleum bulk stations and terminals, a second drop down box will appear to select the **Petroleum Brand**.

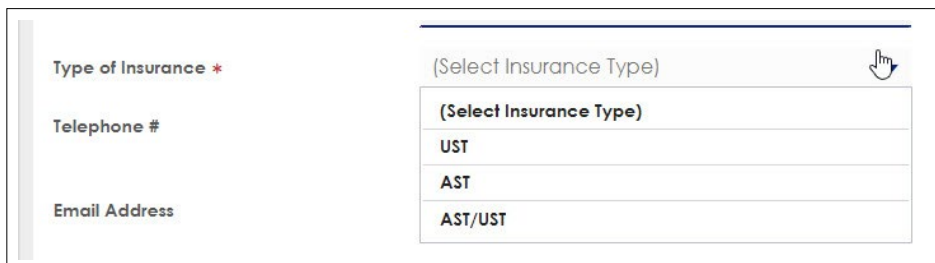


Note: If the petroleum brand is not available from the options, select **Other** and input the petroleum brand.



Select the **Type of Insurance**.

- AST – Aboveground Storage Tanks
- UST – Underground Storage Tanks
- AST/UST – Combination Policy with types of storage tank



When **Type of Insurance** is selected, the following message will appear regarding day tanks:

Any Day Tanks attached to a scheduled tank system are required to be scheduled as a 'Covered aboveground storage tank' for coverage to apply.

Note: There is optional information that can be input on the Account and Insured Info page. This information is not required to proceed with submissions.

- Telephone number of the applicant
- Email address of the applicant
- Federal Employer Identification Number (FEIN) of the applicant (nine (9) digits)

The **Loading and Unloading** coverage question is automatically checked as **Yes**

Is Loading and Unloading coverage to be included on the policy? *

Is the Insured purchasing this coverage to satisfy financial responsibility requirements? *

Certificates will not be provided for tanks located in TN, or NH.

If you choose to select **No** for Loading and Unloading coverage, the following message will appear:

Loading and Unloading is a required coverage to be compliant with financial responsibility regulations. Do you still want to remove this coverage?

Note: If you continue with the No selection for the Loading and Unloading coverage, a certificate of financial responsibility will not generate.

The **Additional Insured** option is available and includes the following information fields:

- Additional Insured Name **Note:** This is the only required field
- Address • City • State • ZIP

ADDITIONAL INSURED

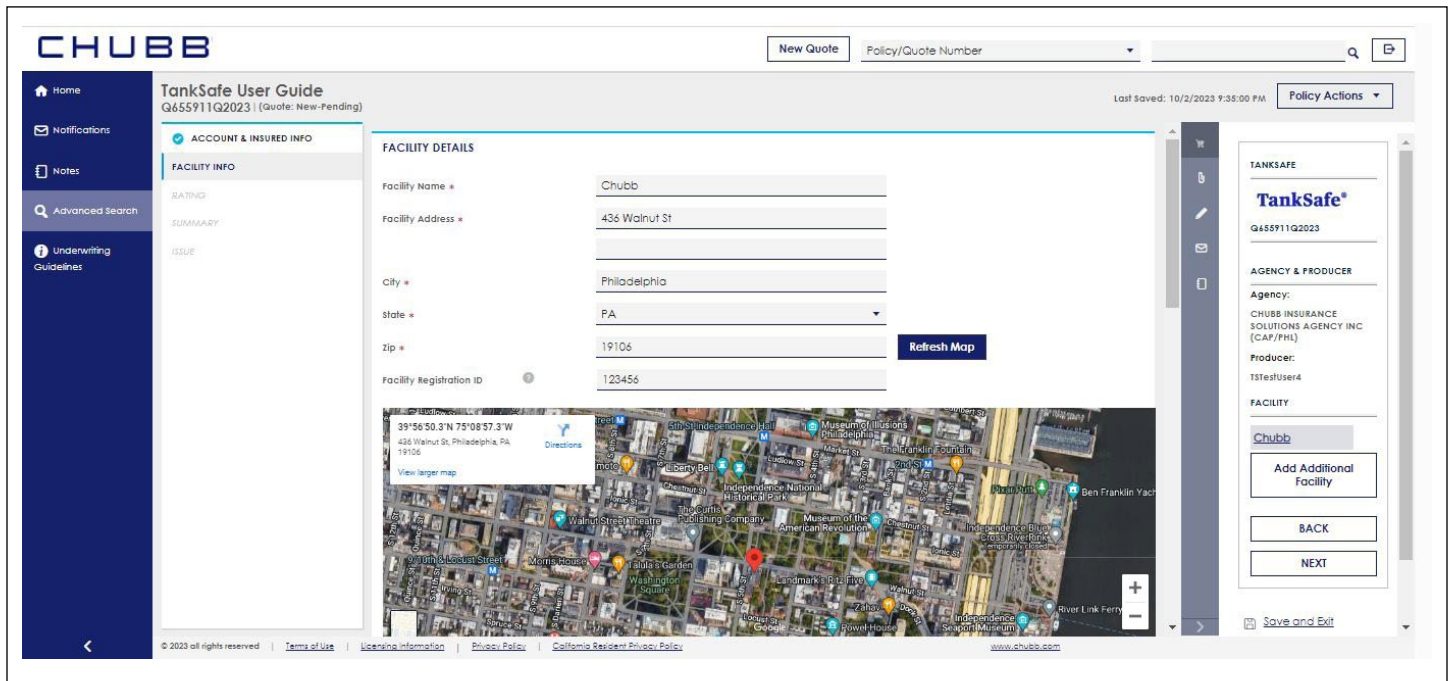
ADDITIONAL INSURED

| | |
|--------------------|--|
| Additional Insured | 123 Additional Insured Way, Philadelphia, PA 19106 |
|--------------------|--|

If there is more than one additional insured, select the **Add Another Additional Insured** button. To delete an additional insured, select the **Delete** button.

Choose **Next** to continue.


Facility Info



On the Facility Info page, you will input information about the facility including USTs and/or ASTs. The information entered on this page is used to create the Certificate(s) of Financial Responsibility.

The following information must be entered:

- Facility Name
- Facility Address
- City
- State
- ZIP

The **Facility Registration ID** is a site identification number assigned by a regulatory agency to the location of the facility as explained in . This number will automatically populate for any Certificate of Financial Responsibility issued on an account.

Once the **Facility Name** and **Facility Address** fields are completed, select the Refresh Map button and the location should appear on the map.

Adding Tanks

To add Aboveground Storage Tanks/Underground Storage tanks go to the specific Storage Tank Details. If both AST and UST coverage is selected, both will appear on the Facility Info page as shown below.

The screenshot displays two sections of the TankSafe interface:

- Aboveground Storage Tank Details:** This section features a header, a dark blue bar labeled "Aboveground Storage Tank List", and two buttons: "Import AST Details from Spreadsheet" and "Add AST".
- Underground Storage Tank Details:** This section features a header, a dark blue bar labeled "Underground Storage Tank List", and two buttons: "Import UST Details from Spreadsheet" and "Add UST".

An AST spreadsheet upload option is available on the **Aboveground Storage Tank Details** section. Click on **Import AST Details from Spreadsheet**.

Once the template is downloaded and completed, use the **Browse** and **Upload** buttons to select and import the spreadsheet tank data.

The "AST Upload" dialog box contains the following elements:

- File Upload Area:** A dashed orange border with a download icon and the text "Drag files here or [Choose from folder](#)".
- Buttons:** "Upload" and "Cancel" buttons.
- Download Template:** A link to download the template.
- Instructions:** "The above template can be used to upload tank-specific information for each facility. Exposure information may also be entered manually. Please note:"
- Notes:**
 - All information must be completed in full. Once all tank information has been input, the subsequent rows may be left blank.
 - Tank information uploads are applicable only on a per facility basis. If there are several facilities to be provided coverage, multiple completed templates will be needed.
 - There are different upload templates for ASTs vs. USTs. Please ensure the correct template is used to provide tank information.
 - The uploaded templates will be saved to the account file. Tank-specific information can then further be updated manually via the TankSafe system interface.

Another option is to manually enter the information by clicking **Add AST**.

Aboveground Storage Tank Details

Aboveground Storage Tank List

AST 1

Import AST Details from Spreadsheet

AST's ID * AST 1

Installation Date * 12/01/2000

Retroactive Date * 10/02/2023

AST Secondary Containment * Impermeable (Concrete/Metal)

Piping Secondary Containment * Yes No

Automatic Overfill/Spill Protection and/or Electronic Leak Detection * Yes No

AST's Capacity Gallons * 2,000

Tank Content * Diesel

Duplicate AST **Add another AST** **Delete AST**

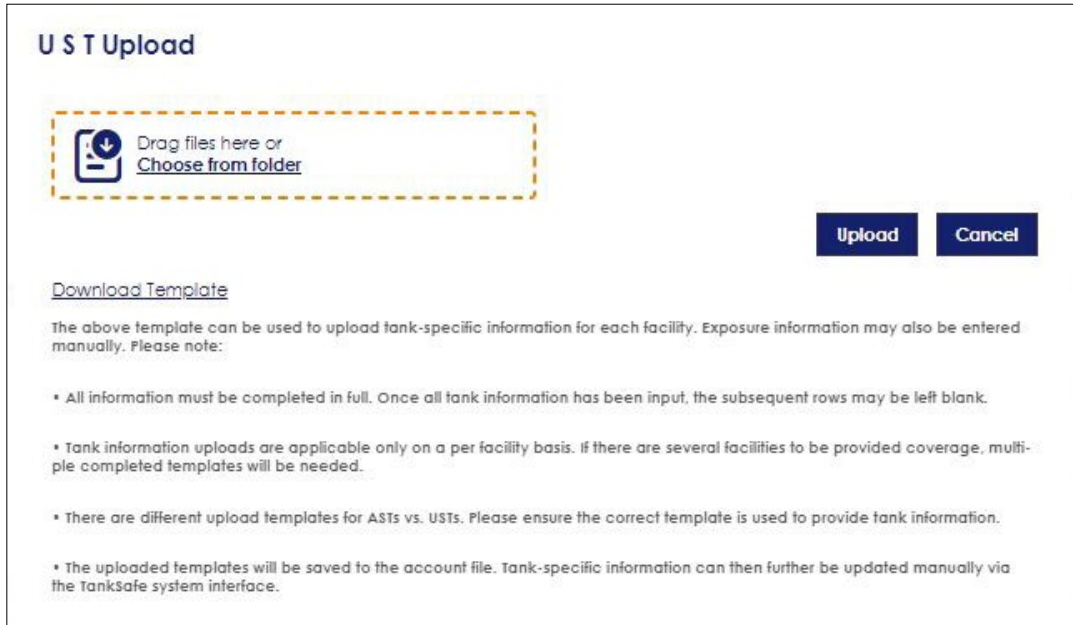
After manually entering AST information, you can select the Duplicate AST button. The **Duplicate AST** button copies your most recent entry leaving the only item to be input as the AST's ID.

Another way to add additional ASTs, is to select **Add Another AST** button, which will allow you to manually enter in the ASTs information.

To delete an AST, select the **Delete AST** button.

An UST spreadsheet upload option is available on the **Underground Storage Tank Details** section. Click on **Import UST Details from Spreadsheet**.

Once the template is downloaded and completed, use the **Browse** and **Upload** buttons to select and import the spreadsheet tank data.

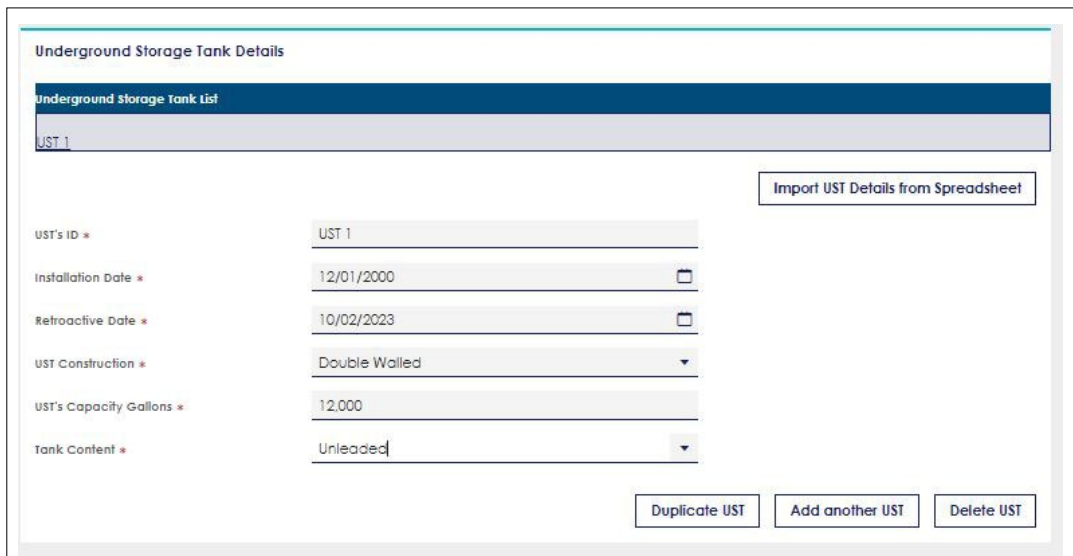


Another option is to manually enter the information by clicking **Add UST**.

After manually entering UST information, you can select the **Duplicate UST** button. The Duplicate UST button copies your most recent entry leaving the only item to be input as the UST's ID.

Another way to add additional USTs, is to select **Add Another UST** button, which will allow you to manually enter in the USTs information.

To delete an UST, select the **Delete UST** button.



For the **AST/UST ID**, you can input your own nomenclature to identify each tank (e.g. UST-01 or AST-01).

Note: If you do not have any particular nomenclature, then designate the tanks as 1, 2, 3, etc.

For the **Installation Date**, use the date of when the tank was installed.

Regarding the **Retroactive Date**, up to 10 years of Retroactive Date coverage can be selected.

Located on the **Facility Info** page are **Facility Level Questions**. These questions must be answered before continuing to the next page.

^
FACILITY LEVEL QUESTIONS

Is there leak detection and tank maintenance for all storage tanks present at this facility? (For example, Statically Inventory Reconciliation (SIR) with Annual Tank Tightness Testing or Automatic Tank Gauging (ATG)/Electronic Monitoring for USTs; Automatic overfill/spill protection and/or electronic leak detection for ASTs.) *

Do you have a written Spill Prevention Control & Countermeasures (SPCC) Plan for this facility? *

Loss History Information for this Facility *

No pollution related clean-ups or 3rd party claims at this facility in past 10 years

Pollution at facility in past 10 years, resolved with regulatory closure

Do you utilize a 3rd party Engineering firm to provide Compliance Management Services for this Facility? *

Are any of the individual underground storage tanks greater than 30,000 gallons in capacity or does the facility have more than 2,000,000 gallons in total aboveground storage tank capacity? *

Do any of the storage tanks contains ethanol or other non-petroleum based products? *

Are any storage tanks located at a marina or airport? *

After completing the facility questions, to add an additional facility, go to the top of the page on the right-hand side and select the **Add Additional Facility** button.

If you do not have another facility to add, choose **Next** to continue.

☰
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TANKSAFE

TankSafe®

Q665911Q2023

AGENCY & PRODUCER

Agency:
CHUBB INSURANCE SOLUTIONS
AGENCY INC (CAP/PHL)

Producer:
TSTestUser4

FACILITY

Chubb

Add Additional Facility

BACK

NEXT

[Save and Exit](#)

[TankSafe Microsite](#)

Rating

The rating page will reveal the **Effective Date** selected at the beginning of the new quote.

The Effective Date selected can range from the present date to seventy (75) days forward.

When the Effective Date is selected, the **Expiration Date** will indicate a one-year term.

Select the **Limits of Liability** using the drop-down box. Defense limits are separate from the aggregate limits.

This is a system-filled field and will always equal the aggregate limit. AST/UST policy limits structure is different for the combined AST/UST policy. Limits are dedicated for the UST exposure and separately to the AST exposure. These dedicated limits are necessary to preserve capacity for financial assurance purposes. Defense limits are outside these dedicated limits and equal to the lesser of the aggregate limits selected. The Total Policy Aggregate Limit is the Aggregate Limit plus the Defense Limit.

The default **Broker Commission** is **Standard**. If **Net** is chosen, the commission will be 0%.

Effective Date : * Expiration Date:

LIMITS OF LIABILITY

| UST | AST | |
|--|--|--|
| <input type="text" value="\$1,000,000"/> | <input type="text" value="\$1,000,000"/> | Per Storage Tank Incident Limit of Liability (Claims and Remediation Costs)* |
| <input type="text" value="\$1,000,000"/> | <input type="text" value="\$1,000,000"/> | Aggregate Limit of Liability(Claims and Remediation Costs) for all Storage Tank Incidents* |
| <input type="text" value="\$2,000,000"/> | | Total Aggregate Limit (Exclusive of Defense Costs) |
| <input type="text" value="\$1,000,000"/> | | Aggregate Limit of Liability for all Legal Defense Expenses for all Storage Tank Incidents |
| <input type="text" value="\$3,000,000"/> | | Total Policy Aggregate Limit of Liability for all Storage Tank Incidents |

Broker Commission (%) *

Broker License Number

After selecting your limits, the **Facility Questions** must be answered on the rating page to continue. The facility questions match the questions on the TankSafe application.

UNDERWRITING & APPLICATION QUESTIONS

Note: Questions below are numbered as per page 2 of the Storage Tank Application.

| | | | |
|--|------------------------------------|-----------------------------------|------------------------------------|
| 8. Were all of the Applicant's or any other party to the proposed insurance's storage tanks new at the time of installation? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 9. Were any storage tanks included on the insured schedule installed more than thirty (30) years ago? (Twenty-five (25) years for tanks located in the state of Connecticut?) | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 10. Are any of the Applicant's or any other party to the proposed insurance's storage tanks located within one (1) mile of a body of water? (If "Yes", please complete the Marina Questionnaire form as an attachment to this application.) | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 11. Are any of the Applicant's or any other party to the proposed insurance's facilities located in the State of Florida? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 12. Are Single-Walled Storage Tanks (i.e., Bare Steel Tanks, Steel Tanks with Cathodic Protection, STIP ¾ Tanks or Tanks operating under ACT 100), with or without any form of tank lining, located at the Applicant's or any other party to the proposed insurance's facilities in the State of Florida? (Only applicable if Question 11. is answered "Yes"); | <input type="button" value="Yes"/> | <input type="button" value="No"/> | <input type="button" value="N/A"/> |
| 13. Within the past five (5) years has the Applicant purchased this type of insurance coverage? (If "Yes", please provide information regarding any such coverage and all available loss information.) | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 14. Are there currently, or have there historically been, any hazardous, toxic, or regulated substances stored at any of the locations for which this application for insurance is being made other than these products: Gasoline, Diesel Fuel, Motor Oil, Fuel Oil, or Kerosene? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 15. Were any tanks ever removed or closed in placed at the location(s) where the scheduled tanks are currently located? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 16. Does the Applicant and any other parties to the proposed insurance maintain a Spill Prevention and Counter Control Plan with regard to any aboveground tanks for which coverage is sought? (If "Yes", please provide a copy of such plan.) | <input type="button" value="Yes"/> | <input type="button" value="No"/> | <input type="button" value="N/A"/> |
| 17. Within the past five (5) years have there been any reportable spills of regulated substances, hazardous waste or any other pollutants, as defined by applicable environmental statutes or regulations, at the facility(ies) where the tanks the Applicant is seeking coverage for are located? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 18. Within the past ten (10) years have any repairs or upgrades been performed on any tanks? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 18a. Are all underground storage tanks compliant with 1998 regulations? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 19. Within the past five (5) years have any claims been made or legal actions (including any regulatory proceedings) been brought against the Applicant or any other party to the proposed insurance? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 20. Does the Applicant or any other party to the proposed insurance have knowledge of pollution conditions at any of the proposed covered locations? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 21. At the time of signing this application, is the Applicant or any other party to the proposed insurance aware of any circumstances that may reasonably be expected to give rise to a claim against any party to the proposed insurance? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 22. Within the last five (5) years before the date of signing this application, has the Applicant, any of its affiliated entities, or any person or entity proposed to be an insured filed or been the subject of any proceeding related to bankruptcy, receivership, and/or insolvency? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |
| 23. At the time of signing this application, do the Applicant, any of its affiliated entities, or any person or entity proposed to be an insured either (a) intend to commence or (b) know of any plan or threat to commence any proceeding relating to bankruptcy, receivership, and/or insolvency, whether by or against one or more of them? | <input type="button" value="Yes"/> | <input type="button" value="No"/> | |

BACK
NEXT

After answering the questions, select **Next** to proceed.

Summary

The **Summary** page presents the information from the previous pages for review.

TankSafe User Guide
Q655911Q2023 | (Quote: New-Pending)

Last Saved: 1

- ACCOUNT & INSURED INFO
- FACILITY INFO
- RATING
- SUMMARY**
- ISSUE

INSURED & POLICY INFO

Insured Info

| | |
|-----------------------|------------------------|
| Insured's Name | TankSafe User Guide |
| Address 1 | 100 S Broad St |
| Address 2 | |
| City, State, Zip Code | Philadelphia, PA 19106 |
| Phone # | - |
| Email Address | - |

Policy Info

| | |
|-------------------|------------|
| Effective Date | 10/02/2023 |
| Expiration Date | 10/02/2024 |
| Type Of Insurance | AST/UST |
| SIC Code | 5411 |

LIMITS OF LIABILITY

| | <u>UST</u> | <u>AST</u> |
|--|-------------|-------------|
| Per Incident | \$1,000,000 | \$1,000,000 |
| Aggregate | \$1,000,000 | \$1,000,000 |
| Total Aggregate (Exclusive of Defense Costs) | \$2,000,000 | |
| Defense Limit | \$1,000,000 | |
| Total Policy Aggregate Limit of Liability for all Storage Tank Incidents | \$3,000,000 | |

| | | |
|---|-----|--|
| Is the Insured purchasing this coverage to satisfy financial responsibility requirements? | Yes | |
| Is Loading and Unloading coverage to be included on the policy? | Yes | |

By clicking on the appropriate chevron arrows, you can review the **Facility, Tank, Additional Insured** and **Underwriting** and **Application Questions** details.

APPLICATION PREVIEW

Total Number of Facilities Submitted for Coverage : 1

[View Facility Details](#)

Number Of ASTs Submitted for Coverage : 1

[View AST Details](#)

Number Of USTs Submitted for Coverage : 1

[View UST Details](#)

| Location Name | Tank ID | Installation Date | Retroactive Date | Tank Construction | UST's Capacity Gallons | Tank Content |
|---------------|---------|-------------------|------------------|-------------------|------------------------|--------------|
| Chubb | UST 1 | 12/01/2000 | 10/02/2023 | Double Walled | 12000 | Unleaded |

Are Additional Insureds to be listed on the Policy : Yes

[View Additional Insured Details](#)

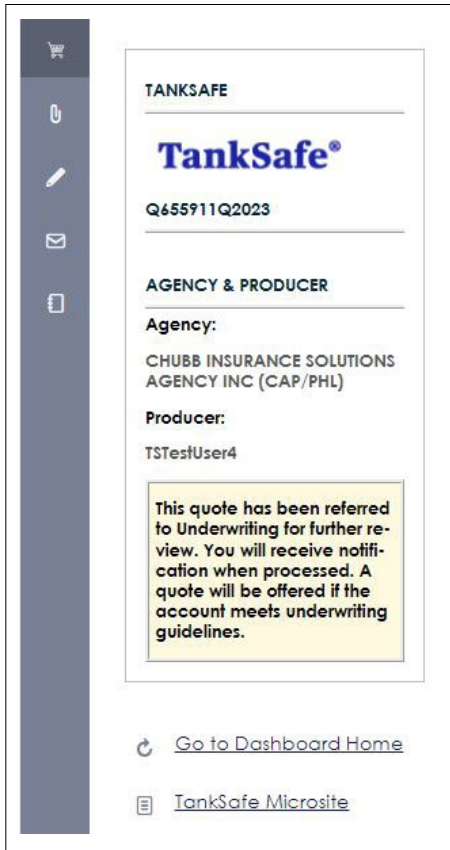
Underwriting and Application Questions

[View Underwriting & Application Question Details](#)

If the submission is not acceptable for coverage or requires further review, you will receive a message in the summary section under **Underwriter Referrals/Declination**. The submission will then refer to underwriting.

UNDERWRITER REFERRALS/DECLINATION

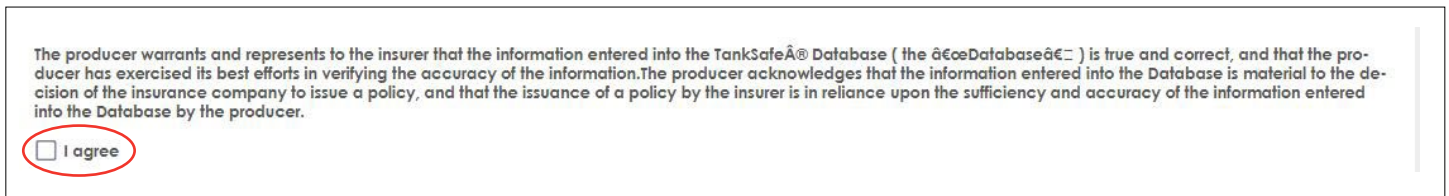
R018 - Submission has been referred due to selected retroactive date.



Additionally, a message will appear on the right side of the screen to indicate an underwriting referral.

Once the submission has been reviewed by underwriting, a system message will be sent to the assigned user and generate in the Notifications section of the dashboard — see page 5, **Notifications**, of this document.

After confirming the information for the quote and reviewing the terms, check the box **I agree**.



You will receive three deductible **Quote Options** showing the premium of that deductible option under Total Premium.

Some states have taxes, which will appear in the quote options under Taxes and will be part of the Total Premium.

To Generate a Quote: Select the appropriate **Quote Options** by checking the associated boxes.

| QUOTE OPTIONS : | | | | | |
|--|------------|--------------|------|-------|---------------|
| Please select up to 3 options to show on your quote. | | | | | |
| | Deductible | Base Premium | TRIA | Taxes | Total Premium |
| <input checked="" type="checkbox"/> | \$5,000 | \$1,480 | \$0 | NA | \$1,480.00 |
| <input type="checkbox"/> | \$10,000 | \$1,258 | \$0 | NA | \$1,258.00 |
| <input type="checkbox"/> | \$25,000 | \$1,006 | \$0 | NA | \$1,006.00 |

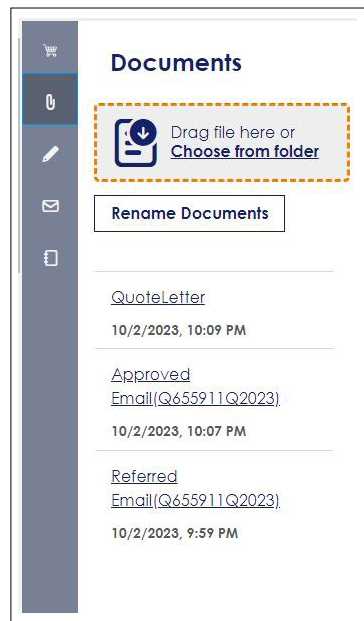
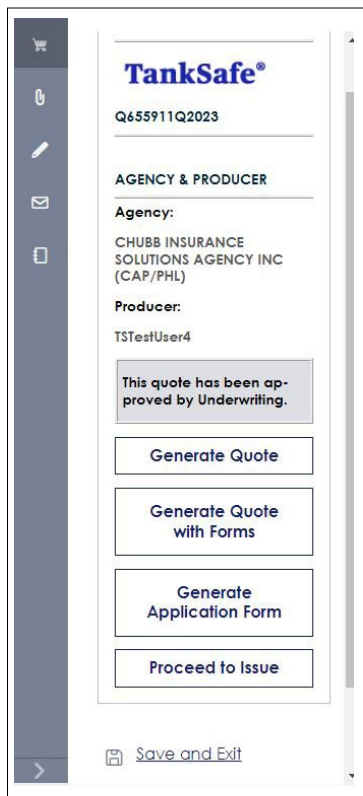
After selecting your **Quote Options**, two Generate Quote options will appear in a box, in the upper right corner.

- Generate Quote
- Generate Quote with Forms

The **Generate Quote** option is a quote letter and the **Generate Quote with Forms** option is a quote with specimen forms.

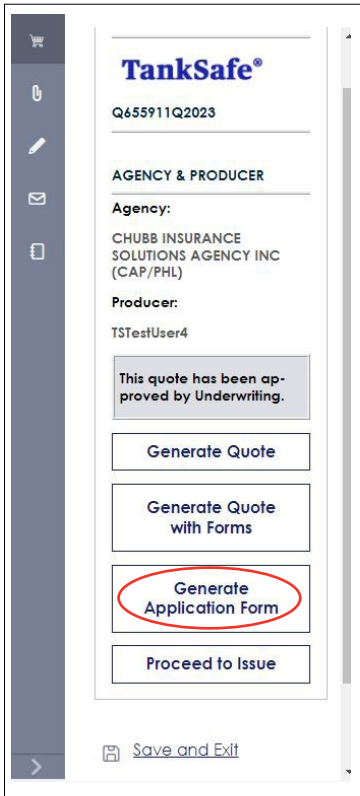
After selecting one of the Quote Options, the generated quote will be available at the bottom left corner in Documents.

By selecting Documents, the folder will open to allow you to select and view your generated quote.

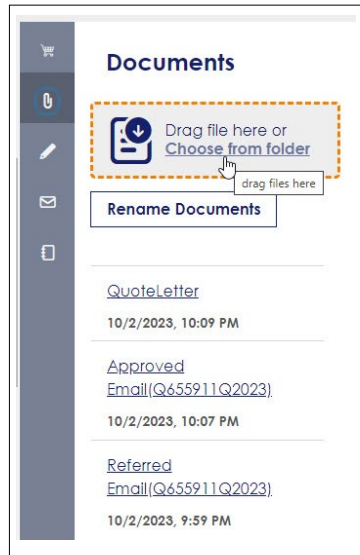


To Generate an Application Form:

Select the **Generate Application Form** button and it will be available in **Documents**.

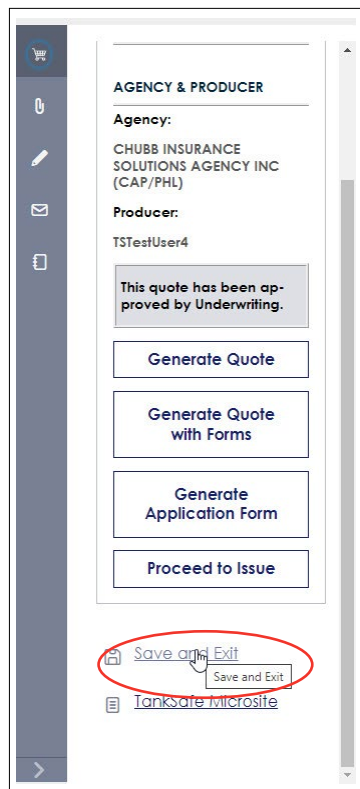


Within the **Documents** folder, is the option to add underwriting information by selecting **Add an Attachment** and uploading the data.



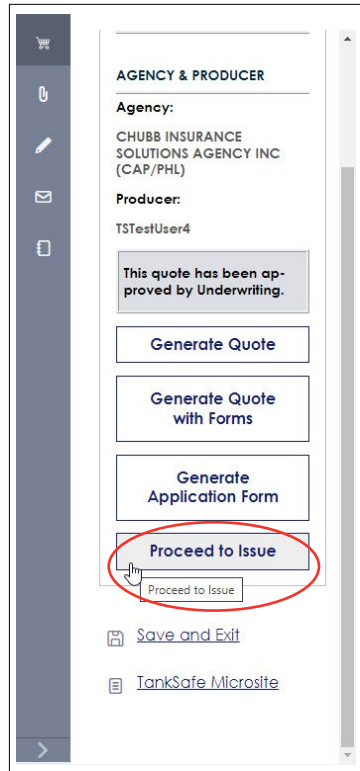
If you Need to Leave the Quote Record:

Make sure to select **Save and Exit** on the right-hand side of the screen to save data and not lock the record.



Issue

To proceed with binding and policy issuance, select the **Proceed to Issue** button on the summary page.



Choose a **Deductible** option to Bind.

BIND OPTIONS :

Please select Deductible option to Bind

| | Deductible | Base Premium | TRIA | Taxes | Total Premium |
|-------------------------------------|------------|--------------|------|-------|---------------|
| <input checked="" type="checkbox"/> | \$5,000 | \$1,480 | \$0 | NA | \$1,480.00 |
| <input type="checkbox"/> | \$10,000 | \$1,258 | \$0 | NA | \$1,258.00 |
| <input type="checkbox"/> | \$25,000 | \$1,006 | \$0 | NA | \$1,006.00 |

Upload a current insured signed and dated application by choosing **Upload Signed Application**.

SIGNED AND DATED APPLICATION

Please Upload a current insured signed and dated application prior to binding coverage. Please note:

- File size should not exceed 30MB
- The following file types are allowed: pdf, jpg, doc, docx, xls, xlsx

Upload Signed Application

Select Browse to choose the file path. Then input a **File Name** such as 'Application'.

Upload

File Name *

Drag file here or
Choose from folder

Upload
Cancel

Once the application has been uploaded, you will be able to bind by selecting the **Issue** button.

New Quote
Policy/Quote Number

Home

Notifications

Notes

Advanced Search

Underwriting Guidelines

TankSafe User Guide
Q655911Q2023 | (Quote: New-Approved)

- ACCOUNT & INSURED INFO
- FACILITY INFO
- RATING
- SUMMARY
- ISSUE

POLICY PERIOD

Effective Date : 10/02/2023
Expiration Date : 10/02/2024

BIND OPTIONS :

Please select Deductible option to Bind

| | Deductible | Base Premium | TRIA | Taxes | Total Premium |
|-------------------------------------|------------|--------------|------|-------|---------------|
| <input checked="" type="checkbox"/> | \$5,000 | \$1,480 | \$0 | NA | \$1,480.00 |
| <input type="checkbox"/> | \$10,000 | \$1,258 | \$0 | NA | \$1,258.00 |
| <input type="checkbox"/> | \$25,000 | \$1,006 | \$0 | NA | \$1,006.00 |

SIGNED AND DATED APPLICATION

Document: [Signed Application 2023](#)

Congratulations, your file has been successfully uploaded. Please click the Issue button to bind coverage and plant a tree. To learn more about Chubb's tree planting initiative, [Click here You Helped Plant a Tree!](#)

TANKSAFE

TankSafe®

Quote Number:
Q655911Q2023

AGENCY & PRODUCER

Agency:
CHUBB INSURANCE SOLUTIONS AGENCY INC (CAP/PHL)

Producer:
TSTestUser4

TankSafe User Guide
Commission:
15%

Company:
ACE American Insurance Company

Admitted Status:
Admitted

ISSUE

Save and Exit

After selecting the **Issue** button, a message in the lower right side will confirm policy issuance.

The screenshot shows the Chubb TankSafe User Guide interface. The main content area displays the following information:

- TankSafe User Guide** (G73235244 001 | InForce: New-Committed)
- POLICY PERIOD:** Effective Date: 10/02/2023, Expiration Date: 10/02/2024
- BIND OPTIONS:** A table with columns: Deductible, Base Premium, TRIA, Taxes, Total Premium.

| Deductible | Base Premium | TRIA | Taxes | Total Premium |
|---|--------------|------|-------|---------------|
| <input checked="" type="checkbox"/> \$5,000 | \$1,480 | \$0 | NA | \$1,480.00 |
| <input type="checkbox"/> \$10,000 | \$1,258 | \$0 | NA | \$1,258.00 |
| <input type="checkbox"/> \$25,000 | \$1,006 | \$0 | NA | \$1,006.00 |
- SIGNED AND DATED APPLICATION:** Document: [Signed_Application_2023](#)

On the right side, a notification box states: "Your policy has been issued! Thank you for making Chubb your market of choice." Below this are buttons for "GENERATE POLICY DOCUMENTS" and "GENERATE CERTIFICATES".

To access your generated documents, go to the lower left corner and click on **Documents**.

The screenshot shows the "Documents" section of the Chubb interface. It features a "Documents" header, a "Rename Documents" button, and a list of generated documents:

- PolicyPack** (10/2/2023, 10:23 PM)
- [319726_App_Form_07182023_021542.pdf](#) (10/2/2023, 10:21 PM)
- [PREVIEW_015_G2_8392369_004_EndLetter_10022023_041313.pdf](#) (10/2/2023, 10:21 PM)
- [QuoteLetter](#) (10/2/2023, 10:19 PM)
- [QuoteLetter](#) (10/2/2023, 10:09 PM)

Renewals

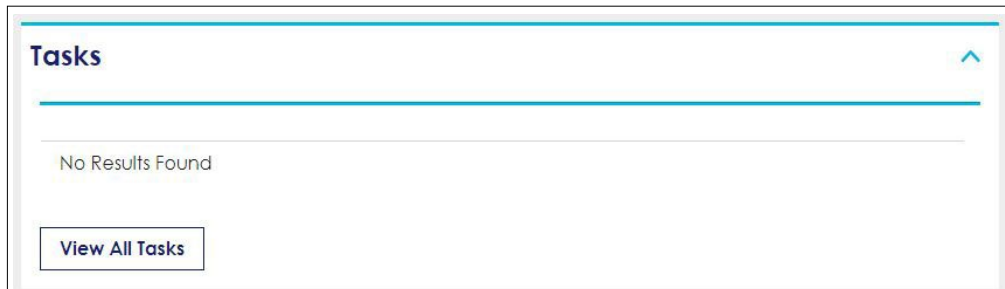
Renewals assigned to your broker code will generate seventy-five (90) days prior to the effective date. Renewal issuance is **NOT AUTOMATIC**. Every renewal must be submitted, reviewed, and bound.

All policy information will carry forward from the current term to the renewal. Please review the submission accordingly at each renewal as information may change at renewal.

Any mid-terms change made to a current Fast Track policy will reflect on the renewal. Any mid-term changes made to an expiring Solutions policy must be updated manually on the renewal.

In addition to the seventy-five (90) days prior to the effective date, there is a four (4) day grace period following the expiration date to bind the renewal. On the 5th day, the renewal quote will expire. Expired renewals will not be reinstated. The only option to bind coverage on a renewal that has expired is to enter the account as a new submission.

Your system-generated renewal should appear automatically under Tasks or View All Task, by selecting **View All Tasks**:



If your renewal submission is not available under **Tasks**, search for a renewal policy by entering the **Policy Number** or **Client Name** in the **Search** box located at the top right corner; click the Magnifying Glass icon or press **Enter**.



Your search will appear under **Search Results**.

Select **Magnifying Glass** to right of named insured.

CHUBB New Quote Policy/Quote Number G73235244

All Clients
 Specific Policies and Quotes
 Specific Clients

Search by:

Search Filters Policy Operator Value

Policy/quote number contains G73235244

Add

Search in:

Search in: All agencies

Include previous terms
 Get status from the most recently updated transaction
 Show only deleted policies

Search

| Policy/Quote # | Insured Name | Line | Eff Date | Exp Date | Status | Locked |
|----------------|---------------------|-----------------|-----------|-----------|---------|--------------------------|
| G73235244 002 | TankSafe User Guide | CarrierTankSafe | 10/2/2024 | 10/2/2025 | InForce | <input type="checkbox"/> |

Page 1 of 1 Per Page Options 10

On the next **TransACT** screen, select the **Edit Policy** icon.

CHUBB New Quote Policy/Quote Number G73235244

TankSafe User Guide G73235244 002Q | InForce Last Saved: 10/2/2023 10:28:00 PM Policy Actions

TransACT

TankSafe User Guide (InForce - Renew - Pending)

| | | | | | |
|----------------|---------------------|------------------|-----------|--------------------|------------|
| Insured Name: | TankSafe User Guide | Effective Date: | 10/2/2023 | Full Term Premium: | \$1,480.00 |
| Policy #: | G73235244 001 | Inception Date: | 10/2/2023 | Written Premium: | \$1,480.00 |
| Policy Status: | InForce | Expiration Date: | 10/2/2024 | | |

Quick Filter All

| Type | Effective Date | New Premium | Charge | Status | Last Modified by |
|--------------|----------------|-------------|------------|-----------|------------------------|
| New Business | 10/2/2023 | \$1,480.00 | \$1,480.00 | Committed | acepartner\TSTestUser4 |
| Renew | 10/2/2024 | \$1,589.00 | \$1,589.00 | Pending | acepartner\TSTestUser2 |

After selecting **Carrier TankSafe**, you will advance into the renewal record at the **Account & Insured Info** page.

The workflow for renewal will follow the same steps as a new submission, with all information pre-filled as expiring. Any changes at renewal should be updated within the submission prior to generation of a quote and/or policy issuance.

Review the information, make any necessary changes on each page and select **Next** to continue.

If you Need to Leave the Quote Record:

Make sure to select **Save and Exit** on the right-hand side of the screen to save data and not lock the record.